

# **Air Resources Board**

## **Manufacturer Document Management System (DMS) TRAINING**

May 3, 2007

California Environmental Protection Agency



**Air Resources Board**

# Agenda

1. DMS Overview
2. Tools to Submit Documents
3. DMS Live Demo
  - New features and changes
  - Review the submission process
4. Questions and Answers

# DMS Overview

## What is DMS ?

- System to Track & Store
  - Electronic Certification Documents (pdf, doc, etc.)
  - Electronic Images (jpg, gif, etc.)
- System to Reduce Paperwork and Improve the Certification Process



# ARB DMS Components

- **SECURITY**

- Protection from tampering/destroying documents
- Protection from unauthorized access

- **WORKFLOW**

- Rules for transferring documents

- **Document Organization**

- File management
- Document Types and Metadata
- Document Naming Convention

- **DOMAIN**

- A domain represents a relatively independent business unit with their own independent documents and rules

# Document Organization Strategy

## DMS DOMAINS

### On Road

- Light Duty (ARB\_ON\_ROAD)
- Motorcycle (ARB\_HMC\_OFMC\_ATV\_EGC)
- Heavy Duty (ARB\_HEAVY\_DUTY)

### Off Road

- All Categories (ARB\_OFF\_ROAD)  
(SSIE/OFCI/SIME/LSIE)

# Document Organization Strategy

- Predefined directory structure
- All manufacturers in the **SAME** category have the **SAME** structure
- Assigned document types for each folder



# Tools

- DMS User Guide
  - File Naming Convention
  - Document Type and Metadata
  - Directory Structure
  - Workflow Naming Guide



# Tools

## – File Naming Convention

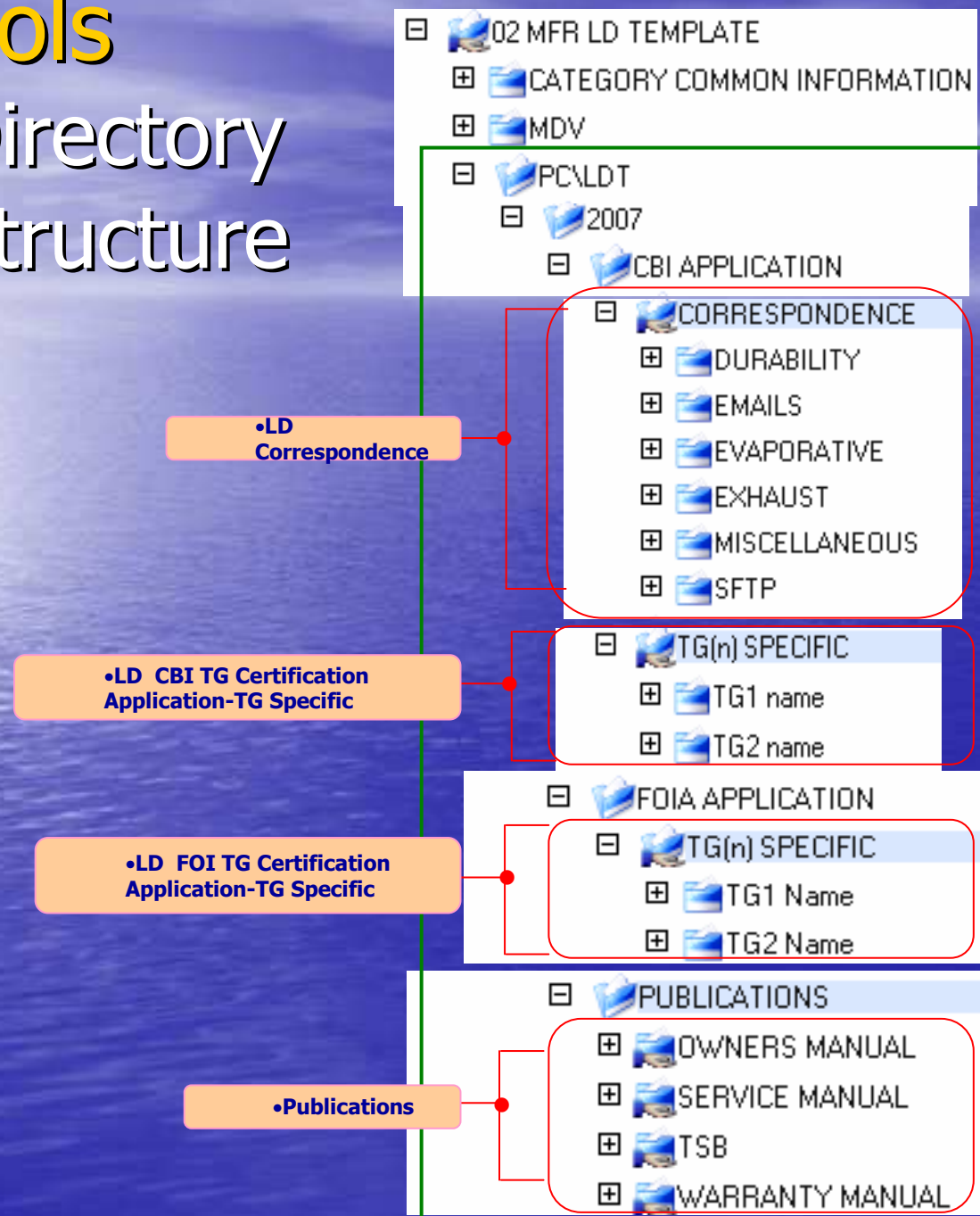




# Tools

## Directory Structure

## DMS Overview



# DMS DEMO

## Features and Functions

- ARB Document Management System Login
- How to Change the Password
- File Browser Tab
  - The Directory Tree vs. List View
- News Board Tab
- Calendar Tab

# DMS DEMO

## Features and Functions

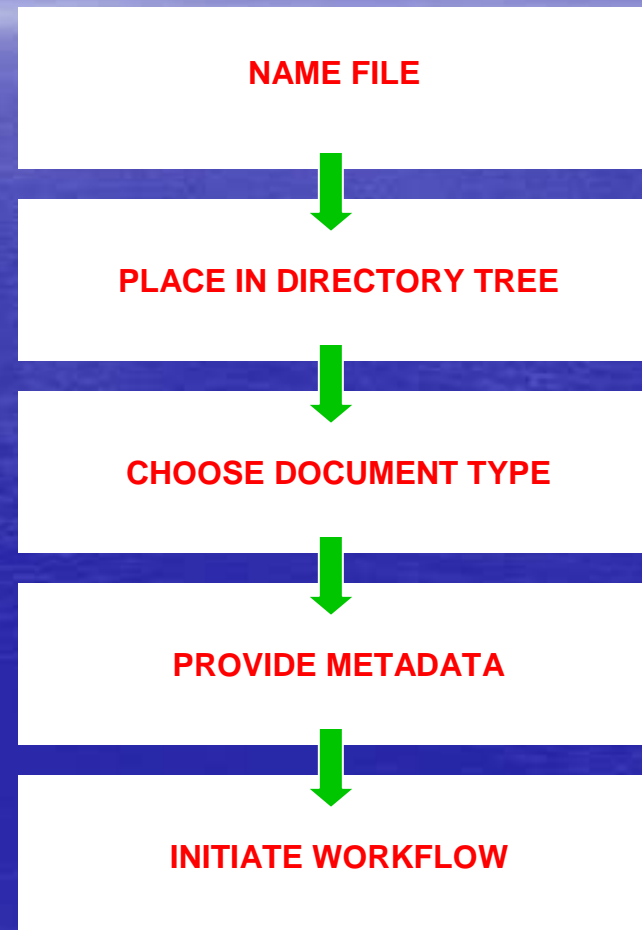
- Create an engine, or test group folder
- Upload a document and add metadata
- View the properties of a document
- Rename documents
- Check-in/Check-out Mechanism





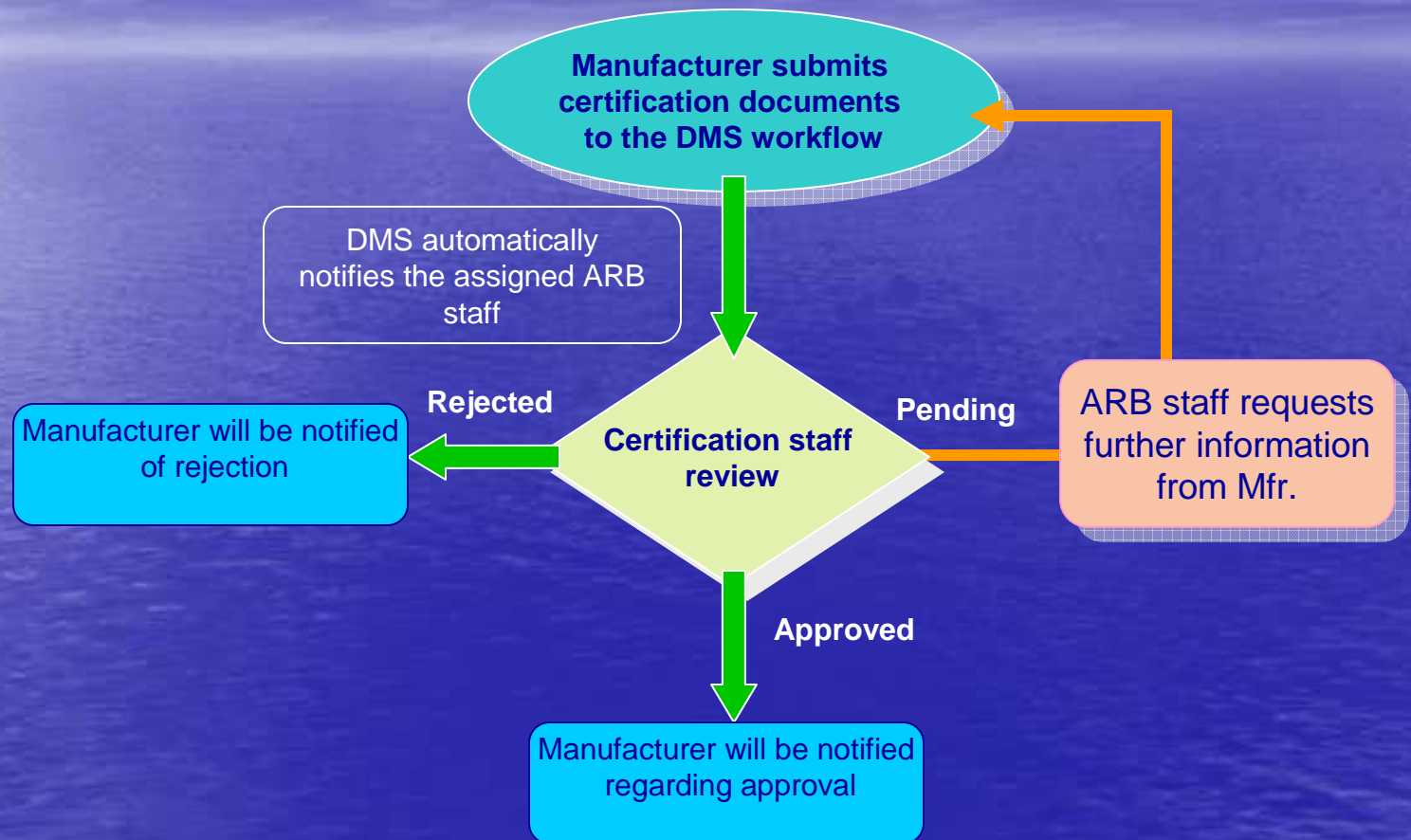
# DMS

## Steps to Submit a Document



# DMS

## Example of a Workflow Process



# DMS Live Demo

## Workflow Example 1

1. Manufacturer will upload an **Emission Label Format** for approval
2. Manufacturer will submit document to the workflow, then will **link** the **emission label** and **the application**
3. ARB staff will approve the **Emission Label Format** without changes
4. Manufacturer will check the document status





# DMS

## Document Submission

### Summary

We learned how to:

1. Upload document
2. Submit document to the workflow for approval
3. Check document status
4. Check workflow status
5. Link documents

# DMS Live Demo

## Workflow Example 2

Manufacturer already uploaded the Application

1. Manufacturer will submit uploaded document to the workflow
2. ARB staff will review submission
3. Manufacturer will receive a notification requesting changes from the ARB staff

# DMS Live Demo

## Workflow Example 2

4. Manufacturer will revise the document retaining original name and resubmit to existing workflow process
5. ARB staff will review submission and approve the application
6. Manufacturer will check on the DMS the approval of the application





# DMS Workflow Example 2

## Summary

We learned how to:

1. Submit uploaded document to the workflow
2. Identify and check a notification requesting changes from ARB staff
3. Submit additional documents or a new version to an existing workflow

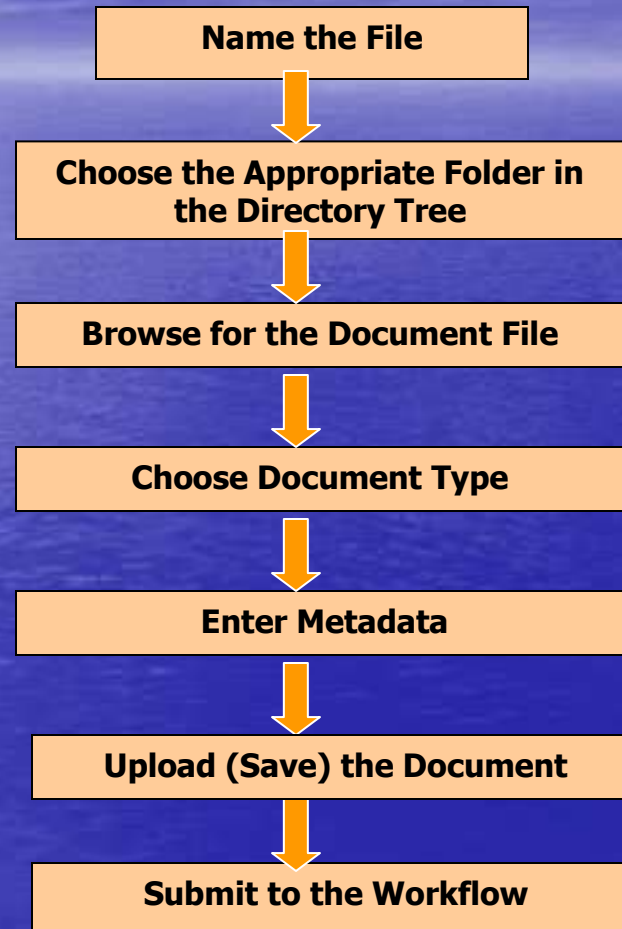
# DMS Workflow Example 2

## Summary

We learned how to:

4. Check document and workflow status
5. Check for notification of approval
6. Access different versions and add comments
7. Compare documents

# Major Steps of Document Submission to the ARB DMS





# DMS

## Additional Features Summary

- **Automatic Version Control:** ensures document integrity
- **Check-in/Check-out Mechanism:** prevents simultaneous content changes and inadvertent overwrites
- **Version Comparison:** facilitates identification of differences
- **Powerful Search :** supports advanced search by metadata/document index

# DMS

## Problems/Troubleshooting

- Contact your ARB certification representative to help delete documents, when
  - a document is uploaded into the wrong folder
  - a document is submitted to the wrong workflow processes
- Contact Ivonne Guzman-Cicero, Kim Pryor (On Road), or Jeff Doll (Off Road), when
  - experiencing Technical problems
  - changing manufacturer representatives

# DMS

## Contact Information

- Regarding the Document Management System please contact:

Ivonne Guzman-Cicero, (626)-575-6718,  
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# Question and Answer

